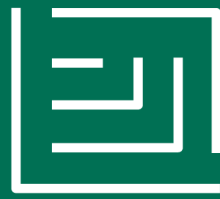


University of Vermont - Grossman School of Business
10th Annual



SCHLESINGER GLOBAL
FAMILY ENTERPRISE
CASE COMPETITION

January 11 - 14, 2023



JUDGES
PROFILE BOOKLET

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COMPETITION
JUDGES



Afi Ahmadi

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Afi Ahmadi is a partner and director at the Burlington, Vermont law firm of Dinse P.C. Mr. Ahmadi joined the firm in November of 1999, after obtaining his J.D. and M.B.A. degrees from Boston University. He concentrates his practice on contracts, financings and sophisticated commercial transactions for Vermont businesses, including family businesses. He first came to Vermont in 1989 as an undergraduate at the University of Vermont, where he served as a student member of the Board of Trustees, the treasurer of the Inter-Residence Association, a student government senator, an orientation leader, and a member of the Boulder Society. He is currently President of the UVM Alumni Association's Board of Directors.



Denise Alosa

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New England Kenworth
USA

Denise is currently Senior Vice President and General Manager of New England Kenworth, a family owned and operated network of truck dealerships in Maine, New Hampshire, and Vermont. This 100 year old business provides truck sales, service and parts for heavy and medium duty trucks serving the Northeast with 8 locations and over 350 employees. New England Kenworth is the largest truck dealership group in New England. The business was the recipient of the 2017 UVM Family Business Award for the Multi-Gen US-Based Family Enterprise Category. Denise, a third-generation family member, specializes in the parts and service areas of the dealerships. The fourth generation has recently joined the business. Before joining the family business, Denise enjoyed a career in Sports Medicine for 25+ years as an athletic trainer. She continues to consult and work in this arena as the Medical Director for the People's United Bank Vermont City Marathon and to the Vermont Department of Public Safety. She graduated with a Bachelor of Science degree from UVM in 1985, and has a Master's degree from UNH



Reena Atanasiadis

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Williams School of Business
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Reena Atanasiadis is the Dean of the Williams School of Business. She brings over two decades of wealth management and finance experience to her university. Her areas of academic interest include Behavioral Finance, Corporate Finance, Portfolio Management and Financial Institutions Management. Prior to her arrival at Bishop's, she was the Director of the John Molson's School of Business MBA in Investment Management. As a senior lecturer in Finance, she received the Dean's Award for teaching excellence at the Graduate level and served as Director of the Kenneth Woods portfolio management program, an innovative initiative through which undergraduates actively manage a \$2.85 million portfolio. With significant expertise in the areas of AACSB accreditation, student-led portfolio management programs, case competition coaching, faculty development, online / hybrid learning and executive education, she has acted as a consultant to universities, organizations and businesses.



Mira Bloemen-Bekx

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Dr. Mira Bloemen-Bekx is the Dean of the Institute of Future Environments at the Hanze University of Applied Sciences in Groningen, the Netherlands. Her academic interests include (the early phases of) the family business succession, the role of social mechanisms in families (for example, learning experiences and informal family governance mechanisms), and business families. Since the beginning of the SG-FECC, she has been involved as a coach or as the judge orientation leader.



John Burton

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Vermont Futures Project
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John is currently the President of Stormsey Associates, a Vermont based consulting firm working with business leaders and communities around issues related to economic development. He is the Director of Research at the Vermont Futures Project where he develops economic data and policies to improve state-wide economic performance. John also consults with the Distributed Ledger Governance Association around distributed ledger pilots, project planning and legislation. He is the Chair of the South Burlington Economic Development Committee and serves on several business association boards. John was the former Founder and President of NPI Technology Management in South Burlington Vermont where for over 30 years he consulted with business executives around technology budget and planning.



Enerino Caruccio

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Enerino "Rino" Caruccio is currently Vice President Insights Planning & Technology (IPAT) for Amazon Devices & Services, responsible for developing, implementing and delivering insightful analysis that scales with the growth of Device & Services portfolio. Rino joined Amazon in March 2006 as Vice President Corporate FP&A and in 2009 became Vice President Worldwide Seller Services Finance. In 2013 he became Vice President Worldwide Consumer Analytics before moving to his current Amazon role in 2017. Prior to joining Amazon, Rino worked 22 years for General Electric, joining the Financial Management Program in 1984 and then GE Corporate Audit Staff. After earning his MBA in 1991, Rino moved to London as a financial analyst for GE International. In 1993, he became Finance Manager for GEM.



Lisa Caruccio

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Caruccio's

USA

Lisa Caruccio is the owner of Cucina Caruccio. She has extensive formal training in cultural cooking, concierge services, and is a well-known master food artist who has earned a name for herself within corporations, festivals, and culinary events. Driven by her love of community and undying admiration of her grandfather, a renowned Italian chef, Lisa has built upon decades of a life living abroad, learning first-hand what beautiful, selfless hospitality looks like, and realizing the undeniable connection between food, family and culture. Lisa is the founder/owner of Caruccio's, a state of the art, two level culinary event and film center she built near Seattle. A "Culinary Performance Center" hosting chefs and winemakers, classes, wine events and film nights.



Ted Castle

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Rhino Foods

USA

Ted Castle is the owner and President of Rhino Foods, a certified B Corporation located in Burlington VT. Rhino employs 250+ employees and manufactures bakery style inclusions for ice cream manufacturers, and a variety of frozen desserts and snacks. Rhino Food's Purpose is to "Impact the Manner in Which Business is Done". Rhino Foods and Ted have been recognized with the Hal Taussig B the Change Award, Beta Gamma Sigma Entrepreneurial Award, Vermont Small Businessperson of the Year, the Terry Ahrich Award for Socially Responsible Business, Forbes Magazine's List of Small Giants, Optimas award for vision in the workplace, Inc Magazine's Entrepreneur of the Year Award, and Special Recognition Award from the Vermont Refugee Resettlement Program.

**Thomas Clark**

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Family Enterprise Canada
Canada

Growing up in a family business, Thomas is acutely aware of the strategies, dynamics, and structures needed to run an effective family business system. As National Director of Content Development and Resources at Family Enterprise Canada, Thomas's focus is primarily on developing thought-provoking education and conducting relevant research for business families and Family Enterprise Advisors (FEAs). Leveraging an understanding of where education and technology can best meet to provide the most modern and interactive learning experience, while also incorporating families, advisors, and academics alike in his educational development process, he has helped Family Enterprise Canada become the go to resource for all things family business in Canada.

**Stephanie Clarke**

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White + Burke Real Estate Advisors, Inc.
USA

Stephanie Clarke is Vice President of White + Burke Real Estate Advisors, running the firm day-to-day and providing outsourced real estate consulting to municipalities, institutions, and businesses around the state. Stephanie received her MBA from Champlain College and her BA from UVM. She serves as a corporator to Northfield Mutual Holding Company and sits on the alumni advisory board for Leadership Champlain. She is passionate about policies around equity, economic development, and climate action. Stephanie lives in Burlington with her husband and toddler and enjoys hiking, cooking, and traveling.



Matt Cota

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Meadow Hill Consulting
USA

Matt Cota is the founder of Meadow Hill Consulting, which provides trade association management and advocacy services to Vermont based non-profit organizations. Meadow Hill manages the Vermont Fuel Dealers Association, a trade association of heating fuel and service companies as well as the Vermont Vehicle and Automotive Dealers Association (VADA), a trade association of auto retailers. Matt is a former journalist and current South Burlington City Councilor. Learn more at meadowhillvt.com.



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James H. Davis is the Vernon Maughan and MaRee C. Buehler Endowed Professor of Management, Chairman of the Marketing and Strategy Department and director of Executive Education in the Jon M. Huntsman School of Business at Utah State University. Prior to Utah State he was the John F. O'Shaughnessy Professor of Family Enterprises, Siegfried Director of Entrepreneurship and a Professor of Strategic Management in the Mendoza College of Business at the University of Notre Dame. His research focuses upon trust, stewardship theory, strategy, and social capital and has appeared in books and elite journals.



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Davis Farmer is an entrepreneur in the life sciences. He has extensive experience with technology transfer, company formation, deal formation, and corporate governance. He has executed on transactions in China, Japan, Europe and the Americas. He has established companies in the US, UK, New Zealand and Russia, and has done business in Turkey and Argentina as well. His current focus is on developing a novel platform for vaccine discovery that activates all components of the immune system.



Walter Frame

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USA

Walter Frame is Executive Vice President at Trapp Family Lodge in Stowe Vermont; implementing the business activities for the resort and 2,500 acre estate; hotel, brewery, cross country skiing, mountain biking, recreation, homeowner association management, and real estate sales & development. Prior to Trapp Family Lodge, Mr. Frame was Vice President and Director of Real Estate Development at Spruce Peak Realty, LLC (AIG Global Real Estate), for the period 2003-2011 where he administered all development, governance and operations for the planned resort community Spruce Peak at Stowe. Prior to his ventures in Vermont, Frame was a regional financial controller for Destination Hotels & Resorts, a hospitality & property management company with more than 9,000 employees, over 9,300 hotel rooms and condominium units, and more than \$2.7 billion in assets under management. Walter is a Trustee for Copley Hospital, Stowe Land Trust, and Spruce Peak Arts Center Foundation. Walter is married to Kristina von Trapp and they live in Stowe with their two daughters, Annie and Stella. Frame earned a bachelor's degree from Babson College and an MBA from Boston College.



Kenneth Ghazey

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CEO GEO Specialty Chemicals
USA

Ken Ghazey has been GEO's President & Chief Executive Officer and a member of its Board of Directors since 2005. Concurrently, from the time of its emergence from bankruptcy until its successful sale in 2011, Mr. Ghazey was a director and chaired the Audit Committee of Wellman Holdings, Inc., one of the five largest PET resin companies in the US. Prior to his tenure with GEO and Wellman, he spent 15 years in a number of senior operating and executive positions in a range of industrial companies. Mr. Ghazey was President of Amerace/Hendrix Wire & Cable from 1987 to 1990; Executive Vice President, CFO, and Treasurer of Darling International from 1990 to 1993 and President, Chief Operating Officer and Director from 1993 to 1996; and Executive Vice President & CFO, Finance & Administration and Director of ENTEX Information Services, Inc. from 1996 to 2000. Immediately prior to becoming CEO of GEO, he was a Partner and Managing Director of an investment firm. He started his career as an auditor and tax specialist with PwC. Mr. Ghazey received a B.S. in Accounting from the University of Vermont in 1978 and is a member of the Massachusetts Society of Certified Public Accountants.



Matt Glass

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Eventage
USA

Matt Glass '90 is Partner and Chief Creative Officer at Eventage, which he founded in 1998 with his wife. Before Eventage, Matt served as Production Manager for the Macy's Thanksgiving Day Parade and other national events produced by the retailer. He has supervised the installation of everything from fireworks shells to rare orchids and managed every type of person, from Teamsters to tap dancers. Matt oversees production and creative services at Eventage. As a scriptwriter, his words have been spoken by the likes of Billie Jean King, Reese Witherspoon, Patrick Dempsey and First Lady Michelle Obama as well as Fortune 100 CEOs and everyday people battling challenges such as breast cancer, brain tumors and multiple sclerosis. Matt Glass is a founding partner and Chief Creative Officer of Eventage, a national event production agency founded in 1998 and based in South Orange, NJ. Matt graduated with a B.A. in English from the University of Vermont.

**Judy Green**

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Family Firm Institute
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Judy Green, Ph.D., is the president of the Family Firm Institute, an international organization engaged in educating, connecting, and inspiring advisors, consultants, educators, and researchers who serve family enterprises. FFI's mission is to be the most influential global network of thought leaders in the field of family enterprise.

**Mark Green**

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Pacific Family Business Institute
USA

Mark T. Green is a family business consultant, speaker, author, educator, and researcher. Mark is co-founder of the Pacific Family Business Institute and leads his own family business consulting firm. He consults for companies internationally on family business issues such as succession, governance, strategy, conflict resolution, and leadership. Previously, Mark was a principal with the Family Business Consulting Group based in Chicago. He was also the A.E. Coleman Chair in Family Business and the Director of the Austin Family Business Program at Oregon State University. He co-founded the Family Enterprise Research Conference (FERC) in 2005 and served as chair of the Educator and Research Conference for the Family Firm Institute.



Danna Greenberg

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Babson College

USA

Danna Greenberg is the Walter H. Carpenter Professor of Organizational Behavior at Babson College where she is also currently serving as Associate Dean of Faculty and Management Division Chair. Her research focuses on how individuals integrate work, family, and community as they move through their careers and how organizations can support individuals to have meaningful, impactful lives in and outside of work.



Lisa Groeneveld

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OnLogic

USA

After a decade in Telecom sales in the US and Europe, Lisa Groeneveld returned to her native Vermont in 2003. She cofounded OnLogic which specializes in industrial computer hardware design and manufacturing. Lisa has guided the company to strategic growth of nearly 25% year over year through her strong international business, sales and technology background. Together with husband and co-founder Roland, she has expanded OnLogic's international efforts to develop in-house engineering and keen industrial design knowledge. Integrating the latest and most requested industrial IoT technologies, OnLogic ensures a seamless fit into complex client solutions. Today the company provides the computing power for some of the world's most well known businesses. As OnLogic's Chair of the Board, Lisa is deeply committed to meeting her clients' business, financial and technical goals.

**Roland Groeneveld**

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Roland Groeneveld is the Executive Chair South Burlington, Vermont based OnLogic. The company designs and produces small, specialized computer systems for embedded and industrial applications. Roland and his wife, Lisa, founded OnLogic in 2003 and have grown it from a small startup to a global business with offices in the US, Europe and Asia. Prior to OnLogic, Roland has served in management and consultancy roles at IT and Internet infrastructure companies in Europe. He has a background in Computer Science and Electrical Engineering and is passionate about automation and advancing the Internet of Things.

**Adam Ifshin**

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DLC Management Corp.

USA

Adam Ifshin is Founder and CEO of DLC Management Corp., which he founded in 1991. Since then, he has grown DLC into one of the nation's premier owners and operators of retail real estate, and one of the most active acquirers of assets with value added potential. Mr. Ifshin oversees DLC's acquisitions and dispositions, capital markets activities, redevelopments, joint ventures, and corporate strategy. As a principal, he has been involved in over \$4.5 billion of real estate transactions. Mr. Ifshin received a BA, cum laude, from Williams College, with honors degrees in economics and history, and was elected to Phi Beta Kappa. Mr. Ifshin is a member of the Board of Trustees of the International Council of Shopping Centers (ICSC), a member of the Executive Board of the Board of Trustees of ICSC, and a full member of the Urban Land Institute (ULI).



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Luis Jimenez Castillo is a Professional Lecturer at the Driehaus College of Business, Management and Entrepreneurship of DePaul University. He earned his Ph.D. in Business Administration at the Business School from the Worcester Polytechnic Institute (WPI) in Worcester, MA. His research interests are internationalization, strategy, corporate entrepreneurship, family firms, and sustainability. In addition, Luis has experience teaching management, strategy, entrepreneurship, and innovation courses. As a family business practitioner, Luis served as the Chairman of the Board of his family's firm in Mexico. He has also consulted for other family-managed companies in the Jalisco area.



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Alvarez & Marsal

USA

While a student at the University of Vermont, Arran was a Lead Student Coordinator during the 2014 and 2015 Family Enterprise Case Competitions. After graduating from the University of Vermont Business School in 2015, Arran spent 4 years at General Electric in their Power and Oil & Gas businesses, holding a variety of positions in the Finance and M&A departments. Arran is currently a Manager in the Private Equity Services practice at Alvarez & Marsal, specializing in operational due diligence and performance improvement for private equity clients.

**Jim Keller**

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USA

Jim Keller is the President of Green Mountain Business Consultants, a consulting business solving a diversity of issues for International enterprises. He is also the retired President of Rengo Packaging Inc., a packaging manufacturer located in Honolulu, Hawaii. Mr. Keller received a Bachelor of Science from the University of Vermont and currently serves as the Interim CEO and President of the UVM Foundation. He received his Masters of Business Administration from Dartmouth College. Mr. Keller is currently the Chairman Emeritus of the University of Vermont Foundation and the Chair of the Indigenous Education Foundation of Tanzania, which provides for co-education opportunities in rural Tanzania Communities.

**Mike Keller**

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USA

Mike is a retired managing partner of Gallagher, Flynn and Company, LLP, a regional CPA firm headquartered in South Burlington, VT. In addition to firm management, Mike was responsible for providing accounting, tax, and general advisory services to closely held or investor-owned businesses in a variety of industries. Mike was a former chair of the Vermont Board of Accountancy as well as New England Peer Review, Inc. Mike currently does advisory board work for family-owned businesses.



Bram Kleppner

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Danforth Pewter

USA

Bram has led Danforth to growth and profitability; instituted company-wide profit-sharing and partially paid maternity leave; added an employee to the Board; and committed the company to getting to zero fossil fuel use. Previously, Bram spent 10 years at Ben & Jerry's doing international marketing. Bram serves on the VT Climate Council, creating the legally binding plan to reduce Vermont's greenhouse gas emissions, and has served on the VT Tax Structure Commission, the Governor's Business Advisory Board for Health Care Financing, and the Medicaid Exchange Advisory Board. Bram also chaired the board of directors of the non-profit Population Media Center, which promotes the rights of women and girls in the developing world. PMC's programs have been seen by over 500 million people. Bram Kleppner has served for 12 years as the non-family member CEO of Danforth Pewter, a 48-year-old family business with roots in the 1750s. Bram returned the company to profitability, instituted company-wide profit-sharing and partially paid maternity leave, and added an employee to the Board. He converted the company's electricity to 100% solar and put the company on a path to zero fossil fuel use. In 2019, Bram was honored with VBSR's Terry Ehrich Award for Lifetime Achievement.



Matt Knight

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Executive Director, Alberta Business Family Institute

Canada

Matt is the Executive Director of the Alberta Business Family Institute responsible for developing and delivering research, education, and programming to support family businesses. Matt is an experienced leader splitting his career between strategy consulting with Deloitte and Ernst & Young helping global family brands like Molson Coors and Estee Lauder and working with family businesses including Ledcor, Umay, and the Latimer Family Trust. Matt is a past sessional instructor at MacEwan University and University of Alberta in Operations and Supply Chain Management. He holds an MBA from Cape Breton University and a Bachelor of Supply Chain & International Business from MacEwan University.

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Grukovisa

With an academic background in biology, education and business administration from two universities in Costa Rica, Jamie Rene Kong Alvarez is a General Manager at the Grukovisa Family Business in Guatemala and teaches at the Universidad de San Jose in Costa Rica.

**Steve Legler**

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TSI Heritage

Steve Legler grew up as the heir apparent to his father in the family business that “Steve Sr.” had started before “Steve Jr.” was born. After dutifully completing his MBA to prepare himself to eventually take over their steel fabricating business, a liquidity event changed those plans pretty quickly. So instead, Steve spent a couple of decades running their “Family Office” even though that term was still not well known. Steve eventually got wind of the “Family Enterprise Advisor Program” in Canada, and somehow ended up there, just in time to have his “calling” in his late 40’s. He has since re-oriented his work towards helping family businesses, while concentrating on the family circle. Steve immersed himself in coaching, mediation and facilitation training, and continues to study Bowen Family Systems Theory. He is the author of SHIFT your Family Business (2014) and the Interdependent Wealth (2019).



Peyton Leveille

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A Grossman school alumni and sixth-year judge, Peyton is a Product Manager at Teamshares. Teamshares is a venture-backed financial technology company that acquires small businesses from owners nearing retirement age and assists them with transitioning the business to employee ownership. Peyton started at Teamshares after partnering with them to move the company his father started, B&L automotive, to employee ownership.



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Dr. Kristen (“Kincy”) Madison is an Associate Professor and Student Ventures Chair in the School of Entrepreneurship at Oklahoma State University. She is an award-winning family business scholar, with much of her research investigating the influence of family-related characteristics on family firm performance and on the treatment and perceptions of non family employees. Her research has been published in top entrepreneurship journals such as Journal of Business Venturing, Entrepreneurship Theory & Practice, and Family Business Review. She serves on the Entrepreneurship Division Research Committee of Academy of Management and on the organizing committee of Family Enterprise Research Conference to help promote and acknowledge research excellence in entrepreneurship and family business.

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Whether guiding a client through an M&A transaction, co-founding my own company, or as a professor teaching about the capital markets, my greatest reward comes from helping others achieve their personal and professional goals. At Peloton, my background as a financial economist, strategy consultant, and entrepreneur brings a differentiated-skill set aimed at maximizing value for our clients. I enjoy working with family-owned companies, I've learned a lot from these inspirational business owners. They are optimistic, creative, and hard-working – Where many see a problem, these folks see an opportunity – Even after 20+ years of working with them, it remains a privileged and rewarding opportunity.

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Zicklin School of Business & Lodge Manufacturing Company

USA

Will Millhiser is an owner and director of Lodge Cast Iron, a family business in Tennessee since 1896. He contributed to a new family stock restriction agreement, new company bylaws, a 5th-gen succession plan, recruiting the first non-family CEO, expanding the board w/ 3 independent directors, and initiating a family council. In his "day job", Will is a business school professor at the City University of New York. He teaches undergraduates, graduate students, and executives how to think about Operations Management and Analytics; he has particular interests in business decision-making under risk and uncertainty. Will received the Baruch College Presidential Excellence Award for Distinguished Teaching, 2013, and the Zicklin School of Business Teaching Excellence Award, 2014.



James Mount

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Mount Family Group, LTD

USA

James has embodied the spirit of entrepreneurship from an early age. The Mount Family started their business in 1982, where he worked part-time during high school. James joined the family business full time in 1997 following a successful education and career in retail management and training. James and his business partner Karen Mount purchased the business from his parents over two transactions in 2009 and 2010. Mount Family Group owns and operates a dozen franchised Westaff offices throughout the Northeast, and has won many awards including the franchised Business of the Year from Westaff and the Jeffrey Butland Family Owned Business of the Year award from the SBA. James has been involved in FECC since its inaugural year, serving FECC as both a judge and as a lead judge.



Will Nedds

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KPMG

USA

William Nedds is an advisory manager and automation development lead within KPMG's Federal advisory practice. After completing his undergraduate studies at the Grossman School of Business in 2016, William began advisory and consulting work within the government space. Now, six years later and after completing his MBA, William oversees the standup of business process optimization and robotic process automation programs within the U.S. Federal Government. Currently residing in Washington, DC, William is thrilled to return to judging the 2022 GSB FECC.

**Viviane Neiter**

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Neiter Consulting
France

Viviane is a slasher in corporate governance. After running a family jewelry store between 1980 and 2003, she has been a family and business advisor at Neiter Consulting in the East of France. She animates the consultative shareholders committee at Wendel, a family business firm. Moreover, she serves as a board member in 4 French listed companies and as a Chair of the French subsidiary of an Irish company Glanbia Performance Nutrition. Viviane teaches corporate governance & CSR in a couple of business schools. She regularly attends FERC and she is a member of the Governance Professionals of Canada. She is excited to serve once more as a judge. All the more, she was co-coach of the ICN team for the 6th annual SG-FECC. She graduated from NEOMA BS in Reims, France.

**Bradley Opsahl**

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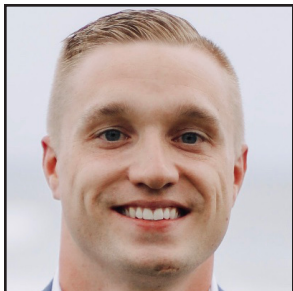
Brad Opsahl is the Senior Director of Economics for Latin America and Europe at Liberty Mutual. His team is responsible for managing the financial health of the business and ensuring the right balance between profit and growth in the product portfolio. He is an alumnus of the Grossman School of Business, class of 2012. He resides in Burlington, VT with his husband enjoying all that Vermont has to offer through the seasons.



Brigett Owens

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Brigett Owens is Director of Marketing and Business Development for the Family Firm Institute. With more than 20 years of experience in digital media marketing, she focuses on curriculum development, instructional design and content strategy for the FFI Global Education Network (GEN). Established in 2012, FFI GEN offers case-based learning and certificate programs for those who serve families in business and families of wealth.



Alex Palmer

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ALDI
USA

Alex Palmer is a New England based Director of Operations for ALDI, a top 10 global retailer with a growing presence in the US grocery market. Alex graduated Cum Laude from the Business School at the University of Vermont in 2012 where he was also awarded Excellence in Entrepreneurship honors. Alex joined ALDI as a District Manager immediately upon graduation from UVM in 2012 and has held multiple roles within the company over the past 8 years. After managing various store districts across New England, Alex spent two years working for ALDI in Canberra, Australia. Today, Alex leads a team of ALDI District Managers, overseeing a total of 34 stores in five states.



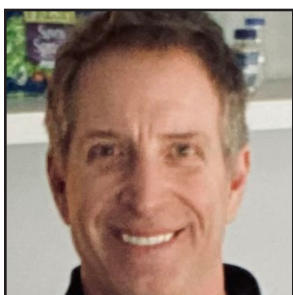
Bob Phillips

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Unilever Director

USA

Bob Phillips is an SJ Partners consumers products operating partner where he currently serves on the board and is an investor in their portfolio company, Osmotics Cosmoceuticals. He has served as a Senior Advisor to Peter J Solomon Company, and a Managing Director of The Clarecastle Group. From 1988 to 2000, Mr. Phillips was with Unilever PLC and Unilever NV where he served as the North American Business Group President and Global Coordinator of Personal Products. During his tenure at Unilever, he served as Chief Executive Officer of Elizabeth Arden Company Worldwide and Chairman of Unilever Prestige Personal Products which included Calvin Klein Cosmetics. Prior to joining Unilever, Mr. Phillips held a number of senior brand management, marketing, and executive positions at Chesebrough-Ponds, Inc. including president and Chief Operating Officer. Upon the acquisition of Chesebrough by Unilever in 1988, he was named president and CEO of the Chesebrough unit holding that office until 1992. From 1979 to 1981, Mr. Phillips launched General Entertainment Corp., a unit of Nabisco. He has also served as the President of the Clairol Division of Bristol Myers. He began his career with the Kool Aid Division of General Foods. Mr. Phillips received a B.A from Dartmouth College, an M.B.A from Columbia Graduate School of Business, and an M.A from the Columbia Graduate School of Arts and Sciences. Mr. Phillips completed active duty in the US Army Counterintelligence Corps attaining the rank of First Lieutenant.



Mark Pins

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State Garden Inc. & Olivia's Organics

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After graduation, Mark spent his first several years in financial services. Following a brief stint as a writer, he moved to a career in the ski industry devoting 14 years as the Marketing Director and ultimately GM for Ragged Mountain Resort. Since 2009, he has served as the Director of Sustainability, Marketing and Customer Service for State Garden and Olivia's Organics/Simple Beginnings Brands.



Devon Rothman

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Beta Technologies

USA

Devon Rothman (UVM'12 graduate) started his career in the financial services industry. Joining Interactive Brokers (the world's largest online broker dealer) Devon began to utilize the foundational knowledge gained during his undergraduate years. With a focus on financial planning & analysis and accounting, Devon spent time working for a financial holding company and a rapidly growing fintech firm before moving from New York to Burlington in 2020. Now a full-time Vermonter, Devon has joined BETA Technologies as a Finance Team Member and is happy to be back in the Green Mountain State. In his free time Devon enjoys hiking, skiing, and spending time with his wife and their dog. After graduating from UVM in 2012, Devon spent the next 9 years working for financial institutions in New York City. In his previous roles Devon focused on asset management, mergers & acquisitions, and corporate strategy & development. Last summer Devon joined Beta Technologies where he focuses on capital raises, investor relations, and financial planning & analysis. He resides in downtown Burlington with his wife and dog.



Petru Sandu

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Elizabethtown College

USA

Petru is the founding director of the Family Business and Entrepreneurship Program and the academic coordinator for the High Center for Family Business at Elizabethtown College. As a tenured associate professor of Entrepreneurship and Management at the School of Business, he has been teaching classes of Family Business, Corporate Strategy, and Entrepreneurship. Petru received his Ph.D. in Entrepreneurship from Al. I. Cuza University, Romania, and his MBA from The Ohio State University. He founded a family business in his old country that has been around for the past 30 years. He has been a visiting professor in several countries, teaching in two other languages besides English. In the Spring semester of 2023, Petru will be a Fulbright Senior Scholar at the University of Murcia, Spain.



Steve Schlesinger

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Schlesinger Group

USA

Steve has been in the marketing research industry for over 30 years, starting his career as a project manager and then working his way up to lead Schlesinger Group for the past 22 years. As a leader within his company, Steve has created the strategy and vision for Schlesinger Group as the world's leading data collection company. He served for 8 years on the board of the then Marketing Research Association, finishing his tenure as the Secretary of the Board. He is a founding member of the Insights Association CEO Summit and co-chairs events. Steve is also founding member of Marketing Research Education Foundation. Steve is a member of Insights Association, AMA, ESOMAR & PMRG. He was presented the MRA (Insights Association) Honorary Lifetime Member award in recognition of a commitment of outstanding individual service to the Association and the marketing research profession.



Rajesh Sinha

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Thermax Inc.

USA

Rajesh is an energy engineer by education and a business manager by profession. He has spent almost three decades with Thermax, internationalizing the energy business practice in several countries in Asia and throughout the Americas. He has been instrumental in making business inroads for Thermax with clients like NASA, the Department of Interior and Department of Defense. Thermax currently leads in the industrial heating and cooling capital equipment sector across several segments like oil and gas, food and beverages, pharma and healthcare, schools and universities, etc. Rajesh is currently preparing Thermax to become a major player in the Energy and Equipment services business.



Jeff Steinhorn

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Gridiron Capital
USA

Mr. Steinhorn is a Partner at Gridiron Capital, focused on Information Technology and the value of how IT can help companies grow and differentiate in the digital age. Prior to joining Gridiron, he was the CIO at Johnson & Johnson, where he was responsible for all aspects of the company's Information Technology for its pharmaceutical business, Consumer, and Consumer Medical Devices businesses. Before J&J, Jeff was the global CIO of Hess Corporation, a \$40 billion vertically integrated energy company. Before running IT at Hess, he was the CIO of Linens & Things, a 500+ store home furnishings chain based in the U.S. and Canada. Jeff began his career with Accenture (formerly Arthur Andersen, then Andersen Consulting). He is on the board of directors of 3 companies and the YMCA, and spent many years on the board of the UVM business school and the NJIT Computer Science School. Jeff received his BS in Business, graduating Magna Cum Laude, from UVM.



Don Stewart

dstewart@stewart-construction.com
Stewart Construction
USA

Don Stewart founded and ran Stewart Construction in Essex Junction, Vermont for 34 years. After a career in the nonprofit sector the Stewarts relocated to Vermont. SCI has grown from small residential projects to a 30 person firm specializing in commercial, educational, healthcare and multi unit construction. "The foundational principles of our company have never changed. Act with integrity, produce a top quality product and treat others with love and respect", said Don recently. At the end of 2022 Aaron Stewart purchased the company with the intention of growing it regionally while maintaining the founding principles.



Chuck Tauck

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Tauck Inc

USA

Chuck Tauck worked for Tauck Tours in various roles until 1992, and after completing a graduate program at Cornell in 1994, returned to organize his family's business for its third generation succession. Today, the company is over 90 years old and already involved in 4th generation planning. In 1996, Chuck joined a group transforming a New York Dairy farm into a vineyard. Today, Sheldrake Point Winery has 52 acres of grapes, produces 12,000 cases of wine and hosts 25,000 visitors annually, and is recognized as one of the top wineries in the Finger Lakes. Chuck graduated from the University of Vermont in 1976.



Mariel van Kempen

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Manimar BV

The Netherlands

Mariel van Kempen is a 3rd generation owner and director of the family holding of the Dutch MCB Group, wholesalers and Service Centers in metal, active in Europe. She is also a member of the supervisory board of the Syndus Group, an inventive problem solver for technical requirements. Furthermore, she serves the Board of the Dutch Chapter (FBNed) of the Family Business Network (FBN) as Vice-President for 8 years. FBNed offers a safe space to learn from, share with and inspire family business owners. Mariel holds a Master of Cultural Anthropology (University Utrecht) and a Master of Science in Business Administration (Erasmus University). Her interests include the role of a joint ownership vision of the family, including governance and social mechanisms, aiming for a sustainable future.



Gregory Vaut

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Vaut & Associated
USA

Mr. Vaut has over 45 years of experience in the international food industry and in agriculture and agribusiness. He has held senior executive positions in the international divisions of two Fortune 500 food companies; as Chief Executive Officer (CEO) or head of operations in commercial food processing and agricultural production, both in the US and abroad; and as Chief of Party (COP) on a \$75 million USAID-funded project in Afghanistan. He has served as an advisor to management and owners of major agribusiness companies on strategic planning, acquisitions, company turnaround and restructuring, management development, new business, and market development.



Randy Warsche

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Resource Management, LLC
USA

D. Randolph Waesche (Randy) has spent his 42 years as a financial consulting pioneer guiding Resource Management, LLC. to national prominence where it has been recognized by Financial Times as one of the top Registered Investment Advisory firms in the country for the past seven years. He is active professionally and, in the community, serving on numerous committees and Boards. In addition to his wealth management activities, Mr. Waesche has earned Fellow status with and is active member of the Family Firm Institute. Mr. Waesche has been personally recognized by Money and WORTH magazines as among the top financial advisors in the country. Mr. Waesche holds a Bachelor of Science degree from Regis University in Denver, Colorado and earned his designation, Certified Financial Planner in 1977 from the College of Financial Planning in Denver, Colorado. You can find Mr. Waesche Wednesdays at 7:30 am on WWL TV every other Tuesday on his "Stretching Your Dollar" segment.



Theodora Welch

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University of Vermont
USA

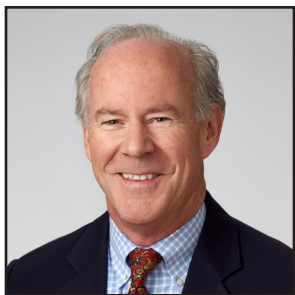
Dr. Theodora (Theo) Welch has taught management for over 20 years and worked extensively on programs that connect business students, the campus and community. Dr. Welch was founder of the Annual College of Management Case Competition at UMass-Boston, mentor to business student teams competing in the B-School Beanpot Case Competition, which typically brought together students from Boston University, Babson College, Bentley University, Suffolk University, Northeastern University, and Massachusetts Institute of Technology, and worked closely with business accelerators in offering MBA project-based experiential courses on venture creation. She received her Ph.D. and M.B.A. degrees in Montreal, Canada at AACSB accredited John Molson School of Business at Concordia University. Earlier in her career Dr. Welch consulted for The World Bank Group in Washington, DC. on high-impact projects for private sector entrepreneurship. She will be joining the Grossman School of Business as an adjunct this spring.



Mark Wetzel

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Fiducient Advisors
USA

As Managing Partner and President, Mark provides leadership for the firm's strategy and overall operations. Additionally, he works with corporate and nonprofit retirement plans, endowments and foundations and private families. Mark was a founder of Fiduciary Investment Advisors, LLC, which combined with Fiducient Advisors in 2020. Mark has served on and chaired multiple nonprofit boards and investment committees, including Northfield Mount Hermon, McLean, Hartford Healthcare and Ellsworth Foundation and serves as a corporator for both the Greater Worcester Community Foundation and the Horace Bushnell Memorial Hall. Mark earned his MBA from the Tuck School at Dartmouth and a BS from the University of Vermont. He enjoys family time, biking, ice hockey and fishing.

**Chuck Wiebe**

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Aspen Circle Advisors
USA

Successful financial services executive with 25+ years of client relationship and transaction experience producing transformative transactions for advisory clients and portfolio companies. Co-founded and served as Chief Compliance Officer of an investment bank licensed as broker-dealer; co-founded two private equity funds focused on mezzanine investments and licensed as SBICs. Led in excess of \$2.5 billion in investment banking transactions as a Managing Director. Successful combination of investment banking and investing skill-sets. Extensive and robust business development expertise in a variety of industries and offering a wide range of investing and advisory services. He has served on numerous nonprofit and for-profit organizations.

**Robyn Worrall**

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RJW Pharma, LLC
USA

Robyn graduated from UVM in 2014 from the Business School, and also participated in FECC her senior year. After graduation, she moved to NYC and worked in sales before deciding to join her family business, which is focused in the pharmaceutical industry. After working there for a few years, she moved into Business Development at a generic pharmaceutical company called Lannett managing mergers and acquisitions for the firm. Using the knowledge gained at Lannett, Robyn recently started a sister company under her family business focused on growing and diversifying the core business model her mom built over 30 years ago.









SCHLESINGER GLOBAL FAMILY ENTERPRISE CASE COMPETITION

ESTABLISHED 2013

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